



Gary Winwood-Smith

Senior Financial Planner | Director

SPECIALIST SKILLS

Retirement planning advice – Preparing for retirement
Retirement planning advice – Income stream strategies
Wealth creation strategies

PROFESSIONAL QUALIFICATIONS

Bachelor of Commerce (Financial Planning and Investment)
Tax (Financial) Adviser

MEMBERSHIPS AND ASSOCIATIONS

Authorised Representative of Charter Financial Planning
Member of the Credit Ombudsman Service
Member of The Advisers Association (TAA)

CAREER AND INDUSTRY HIGHLIGHTS

2015 Most Trusted Adviser - Beddoes Institute
2016 Most Trusted Adviser - Beddoes Institute
2017 Most Trusted Adviser - Beddoes Institute
2018 Most Trusted Adviser - Beddoes Institute
2023 Most Trusted Adviser – Beddoes Institute
Platinum Adviser - Adviser Ratings
Top 50 Adviser – Adviser Ratings

PERSONAL INTERESTS

Gary is married with three children (including twins). He enjoys sports including touch football, swimming, and basketball. Gary also enjoys coaching his local basketball team where his children play.

“I am passionate about working with my clients to identify, clarify and quantify their dreams. Together, with focus and determination, we can achieve amazing results.”